



# ***Electronic Submission of Signature*** ***Pages***

## **Defense Security Service**

### **Office of the Chief Information Officer**

**January 2007**



# AGENDA

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- Overview
- Personnel Security Investigation (PSI) Signature Pages
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- Screen Shot Review
- Transition Tips
  - Transition (Paper Message)



# PSI Signature Pages Overview

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- The PSI Signature Page automation feature will allow DoD and Industry security professionals, as well as investigation applicants the ability to send Person Security Questionnaire /SF 86 (PSQ) signature pages to JPAS
- PSQ Signature Pages must be received in JPAS in order to complete the review process, approve or submit to DISCO for approval (Industry)
- Two methods to provide signature pages to JPAS:
  - ✓ Fax
  - ✓ Upload

\* Upon implementation, all PSIs initiated and/or revised must follow this process



# PSI Signature Pages Overview

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- PSQ Signature Page documents are
  - Certification of SF86
  - Authorization for Release of Information
  - Release of Medical Information
    - ✓ Required if subject answers “Yes” to Question 21
- Documents must be associated with an investigation request before
  - DOD security professional can approve PSQ and forward request to OPM
  - Industry security professional can submit investigation request to DISCO
  - DISCO can approve and submit investigation request to OPM



# PSI Signature Pages Overview

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- Signature Pages can be viewed and replaced in JPAS
- Investigation Status Notification re-displays when signature pages are received and displays receipt of currently associated signature pages
- Status History of signature documents are displayed in JPAS for documents associated with an investigation request
  - ✓ Method (fax or upload)
  - ✓ Result (success or failure)
  - ✓ Date and Time



## FAX

- FAX
  - Anyone can fax a signature page
  - Using Optical Character Recognition (OCR) & information on the faxed document, JPAS reads & associates the fax to the correct investigation request and document type
- The Security Manager can print blank signature pages from JPAS, or the applicant can print the signature page from e-QIP once they have certified the SF 86
- Faxed documents are stored in the JPAS repository until the Investigation Request is approved



# PSI Signature Pages FAX

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- Faxed documents are sent directly to servers to be associated with PSQ
- For Industry, the documents are sent to OPM upon DISCO Approval
- Once approved, the documents are no longer accessible and new documents should not be faxed or uploaded
- Fax phone number is 1-866-804-0686 (*operational 4Mar*)
- Documents to be faxed are
  - SF 86 Certification
  - General Release



# PSI Signature Pages FAX

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- Possible fax OCR errors
- Identifying information on fax cannot be associated with investigation request in JPAS
  - ✓ identified by JPAS - corrected by system administrator when possible
- Fax associated with wrong investigation or document type
  - ✓ identified by subject - subject contacts DSS helpdesk
  - ✓ identified by OPM - OPM contacts DSS helpdesk



# FAX TIPS

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- ADOBE PRINT SETTING
  - Page Scaling (*SELECT NONE*)
  - Auto Rotate Center (*SELECT CHECKBOX*)
  - Advanced Tab (*DESELECT PRINT AS IMAGE*)



# PSI Signature Pad UPLOAD

- UPLOAD
- JCAVS user can browse and select a document from a local or network drive to upload
- User identifies type of document & appropriate investigation request from JPAS selection to upload
- Documents are associated with investigation request in real-time and can be replaced if errors have occurred

\* *All uploaded documents must be in .pdf format & cannot be larger than 1 mb*



# PSI Signature Pages UPLOAD

- Possible Upload errors
- e-QIP Unavailable
  - Identified to JPAS and displayed to JPAS user
    - ➔ check portal for planned outage & try again later
- e-QIP Validation error
  - Identified by eQIP and displayed to JPAS user
    - ➔ contact DSS Helpdesk
- Incorrect Document uploaded
  - Identified by user
    - ➔ view document to verify then replace with new  
upload or fax



# Add / Modify Investigation Request

## Ready for Review / No Documents

State: New York Zip Code: 117062202

**Official Personnel Folder**

\*Location: Other

Location Name: MCAS EL TORO

Street Address 1: 40 DREXEL DRIVE

Street Address 2: MCAS EL TORO

Street Address 3: SANTA ANA

City: BAYSHORE

State: New York

Zip Code: 117062202

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**Investigation Request Status History**

Created By: 027692 - 02769 - LOCKHEED MARTIN/MARITIME SYSTEMS & SENSORS, Level 2

Documents: ☐ \*SF86 Cert ☐ \*Info Release

| Status               | Date       |
|----------------------|------------|
| Initiated PSI        | 2005 01 19 |
| Ready for Review PSQ | 2005 01 22 |

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[View PSQ](#) [View Blank Signature Pages](#) [Documents](#)

☐ Stop PSQ ☐ Revise PSQ

The Documents Link allows viewing of associated documents, or the Upload function

**Note:** When you FAX a document the system will read the Investigation Request Number and automatically populate the appropriate document box.



# Investigation Request Documents

## Ready for Review / Notes

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Investigation Request Documents

RADCLIFFE SR., THOMAS I

SSN: 000-02-1470

Grade: O4

Category: Active Duty - Enlisted (USA)

Active Request:

SSBI, Ready for Review PSQ on 2005 01 22 for Industry (Contractor) 1JRY8-I by A31CFLZX3 - A31CFLZX - 0117  
INTELLIGENCE SQ, Level 3, 614-823-4759, 3d.email@eds.com, Days Until Termination: 20

Document History

| Document Type | Status | Date - Time |
|---------------|--------|-------------|
|---------------|--------|-------------|

Document Upload

Document Type:

\*SF86 Cert

File Location:

Browse...

Save

Save and Return

Cancel

**Note:** When you scan a document, you must select document type and locate document from your computer. Ensure you have a naming scheme which will clearly identify the appropriate document to be uploaded.



# Add / Modify Investigation Request Documents Attached (DoD)

**Official Personnel Folder**

\*Location: Other   
Location Name: FT. LEE  
Street Address 1: 123 Main Street  
Street Address 2:   
Street Address 3:   
City: Columbus  
State: Ohio  Zip Code: 43017

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**Investigation Request Status History**

Created By: W0UDAA - US ARMY GARRISON FT LEE, Level 5

**Documents:** ☒ \*SF86 Cert ☒ \*Info Release ☒ Med Release

| Status               | Date       |
|----------------------|------------|
| Initiated PSI        | 2005 01 13 |
| Ready for Review PSQ | 2005 01 18 |

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[View PSQ](#) [View Blank Signature Pages](#) [Documents](#)

☐ Stop PSQ ☒ Review PSQ ☐ Review & Approve PSQ ☐ Revise PSQ

**Note: For DOD Users the "Review PSQ" or the "Review & Approve PSQ" button will only be available when required documents are received.**



# Add / Modify Investigation Request Documents Attached

State: New York Zip Code: 117062202

**Official Personnel Folder**

\*Location: Other  
Location Name: MCAS EL TORO  
Street Address 1: 40 DREXEL DRIVE  
Street Address 2: MCAS EL TORO  
Street Address 3: SANTA ANA  
City: BAYSHORE  
State: New York Zip Code: 117062202

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**Investigation Request Status History**

Created By: 027692 - 02769 - LOCKHEED MARTIN/MARITIME SYSTEMS & SENSORS, Level 2

**Documents:** ☒ \*SF86 Cert ☒ \*Info Release ☒ Med Release

| Status               | Date       |
|----------------------|------------|
| Initiated PSI        | 2005 01 19 |
| Ready for Review PSQ | 2005 01 22 |

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[View PSQ](#) [View Blank Signature Pages](#) [Documents](#)

☐ Stop PSQ ☒ Submit to DISCO ☐ Revise PSQ

**Note: "Submit to DISCO" button will only be available when required documents are received.**



# Investigation Request Documents

## Ready for Review/Approval

### ? Investigation Request Documents

**RADCLIFFE SR., THOMAS I**

**SSN:** 000-02-1470

**Grade:** N/A

**Category:** Industry (Contractor) 1JRY8-I

**Active** SSBI, Ready for DISCO Review and Approval PSQ on 2005 01 31 for Industry (Contractor) 1JRY8-I by A31CFLZX3 - A31CFLZX -  
**Request:** 0117 INTELLIGENCE SQ, Level 3, 614-823-4759, 3d.email@eds.com, Days Until Termination: 20

#### Document History

| Document Type                 | Status                                 | Date - Time           |
|-------------------------------|----------------------------------------|-----------------------|
| <a href="#">*SF86 Cert</a>    | Fax Received                           | 2005 01 31 - 04:59:59 |
| <a href="#">*Info Release</a> | Upload Received                        | 2005 01 31 - 10:27:44 |
| <a href="#">Med Release</a>   | Fax Received                           | 2005 01 19 - 15:24:24 |
| *Info Release                 | Upload Received                        | 2005 01 30 - 12:50:00 |
| *Info Release                 | Attachment Failed: e-QIP Not Available | 2005 01 29 - 14:41:59 |
| *SF86 Cert                    | Attachment Failed: e-QIP Not Available | 2005 01 28 - 09:35:46 |
| *Info Release                 | Fax Received                           | 2005 01 27 - 10:17:42 |

Close

**Note: Documents are available for review until approved.**



# Investigation Request Status Notification

## (expanded) Error Message

### ? Investigation Request Status Notification

Records 1 - 4 of 5, Page 1 of 2

1 2 [Next](#) [Last](#)

Sort/Find By: Last Name  ☒ Ascending ☐ Descending

Find:

| SSN                         | Name                      | Category                                                                     | Type | Request Status                                      | Status Date | Days Until Term. | Expand                              | Remove From Display      |
|-----------------------------|---------------------------|------------------------------------------------------------------------------|------|-----------------------------------------------------|-------------|------------------|-------------------------------------|--------------------------|
| <a href="#">000-62-6136</a> | ALLEN, GEORGE KITCHENER   | Active Duty                                                                  | SSBI | <a href="#">Ready for Review PSQ</a>                | 2006 04 20  | 60               | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| <a href="#">000-20-6395</a> | ALMOS, IRENE JOANNE       | Academy                                                                      | ANCI | <a href="#">Initiated PSI</a>                       | 2006 04 25  | 85               | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| <a href="#">000-18-6675</a> | ALMOS, JAMES EDWARD       | Academy                                                                      | ANCI | <a href="#">Initiated PSI</a>                       | 2006 03 31  | 40               | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| <a href="#">000-98-5775</a> | HARRIS, SCOTT STIRLING    | Reserve                                                                      | ANCI | <a href="#">Initiated PSI</a>                       | 2006 02 28  | 29               | <input type="checkbox"/>            | <input type="checkbox"/> |
| <a href="#">000-80-1907</a> | MURRAY, MICHELLE MARIE    | Active Duty                                                                  | NACI | <a href="#">Terminated PSI</a>                      | 2006 03 15  | N/A              | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Document Type               |                           | Received Date                                                                |      |                                                     |             |                  |                                     |                          |
| Info Release                |                           | 2006 03 10                                                                   |      |                                                     |             |                  |                                     |                          |
| SF86 Cert                   |                           | 2006 03 10                                                                   |      |                                                     |             |                  |                                     |                          |
| Info Release                |                           | 2006 03 16 (Fax received when Investigation Request is in Terminated Status) |      |                                                     |             |                  |                                     |                          |
| <a href="#">000-02-1470</a> | RADCLIFFE SR., THOMAS IRA | Industry                                                                     | SSBI | <a href="#">Ready for DISCO Review and Approval</a> | 2006 04 01  | 60               | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| <a href="#">000-83-1709</a> | SCOTT, JAMES              | Industry                                                                     | NLC  | <a href="#">Approved PSQ</a>                        | 2006 01 25  | N/A              | <input type="checkbox"/>            | <input type="checkbox"/> |

Records 1 - 4 of 5, Page 1 of 2

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# Transition Tips

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- Deployment Transition
  - Signature Pages for investigation requests prior to implementation of the JPAS automated signature page must be delivered directly to OPM
  - A message is displayed on the JPAS screen when paper must be sent to OPM instead of using the JPAS automated signature page



# Investigation Request Document Transition Paper Message

## ? Investigation Request Documents

RADCLIFFE SR., THOMAS I

SSN: 000-02-1470

Grade: O4

Category: Active Duty - Enlisted (USA)

**Active Request:** SSBI, Ready for Review PSQ on 2005 09 22 for Industry (Contractor) 1JRY8-I by A31CFLZX3 - A31CFLZX - 0117 INTELLIGENCE SQ, Level 3, 614-823-4759, 3d.email@eds.com, Days Until Termination: 20

### Document History

| Document Type                                                             | Status | Date - Time |
|---------------------------------------------------------------------------|--------|-------------|
| Attachments cannot be sent electronically for this Investigation Request. |        |             |
| <div>Close</div>                                                          |        |             |

**Note: This is the message you will receive if you try to fax documents for a request that was initiated prior to implementation of electronic signature page attachment feature.**